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# DONOR ADVISED FUNDS

## WHAT IS A Donor Advised Fund (DAF)?

A Donor Advised Fund (DAF) is a charitable giving vehicle that allows donors to contribute as frequently and as much as they would like to a central, personalized fund account. Donors then recommend grants to favorite charities from the fund as advisors. The fund itself is established through a public charity so donors can receive an immediate and substantial tax benefit on their contributions and avoid capital gains tax on appreciated assets.



## WHAT CAN Go into a DAF?

- Cash
- Stocks
- Mutual Fund shares
- Real estate
- Bequests
- Trust interests
- Life Insurance
- Tangible Personal Property (coins, art, jewelry, vehicles, etc.)
- There's more, too - ask us



## WHAT ARE The Benefits of a DAF?

- Immediate tax deduction
- Avoid capital gains taxes on highly appreciated positions
- Organize philanthropic giving
- Create a legacy, fund ownership can be passed down
- Build endowments
- Ability to gift anonymously



## ARE THERE Minimums or Maximums Associated with DAFs?

- \$5,000 minimum to open an account with AFM's preferred provider, Renaissance Charitable
- \$250 minimum for subsequent contributions
- \$250 minimum for disbursements or grants from a DAF



## Ready to get started? Do you have questions?

Email your Financial Advisor or call us at (202) 887-8135.

